**Terminology System and Services**

# COORDINATOR'S TRAINING MANUAL

**Data Standards Branch**
**EPA / Office of Environmental Information**

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# 1.0 OVERVIEW

The EPA Terminology System and Services is a system to create, modify, manage and publish terminology systems, including glossaries, pick lists, key word lists, classification schemes, taxonomies, and thesauri. The Terminology Services Coordinators are responsible for supporting vocabulary developers by maintaining the EPA Terminology System and providing related services. They set general guidance for the use of the system and promote the use of the system through training and outreach. System Administrators support the Coordinators by performing specific activities for vocabularies in the EPA Terminology System. These functions include creating vocabularies, extending the attributes, assigning and modifying permissions, creating new relationship types, and supporting the development of reports.

This manual provides procedures for the Terminology Services Coordinators who will support the stewards and users of vocabularies and the Terminology System and Services as a whole. It also addresses the procedures used by Administrators and Super-Administrators. It does not address the procedures for an IT Systems Administrator or an Oracle DBA. For those questions, please refer to the appropriate Synaptica documentation available from the Terminology System and Services Resources web site.

The manual covers the following activities.

- An Introduction to the Terminology System
- Creating Vocabularies Directly or by Importing into the System
- Copying or Replicating Vocabularies
- Deleting Vocabularies
- Creating or Deleting Relationship Types
- Creating and Deleting Taskviews
- Creating and Deleting User Accounts
- Assigning User IDs and Permissions
- Creating and Saving Reports
- Appendices containing examples and templates
- A Glossary of Synaptica *Terminology* contains definitions of terminology used by the Synaptica software. This is particularly valuable when developing reports. The glossary is intended to be used as a companion to the instructions below.

Each section provides step-by-step instructions on performing a series of functions.

- Steps that you should perform are presented in **bold**.
- The system response is presented or described in *italics*.
- Explanatory text is in regular font.

# 2.0 INTRODUCTION TO THE EPA TERMINOLOGY SYSTEM AND SERVICES

The EPA Terminology System and Services is an online web-based system for creating, maintaining, searching and publishing vocabularies. This system consists of five components:

### *Content*

The EPA Terminology System and Services is a repository of terms of importance to the EPA, its stakeholders and partners. It currently includes a selection of vocabularies, including those that were in the system's predecessor, the Terminology Reference System (TRS). Some vocabularies have been archived until their quality and timeliness can be assessed. The remaining vocabularies are in an Active task view. The vocabularies that you can see and the functions you can perform are managed by a series of task views which group vocabularies together and by permission levels assigned to your user account.

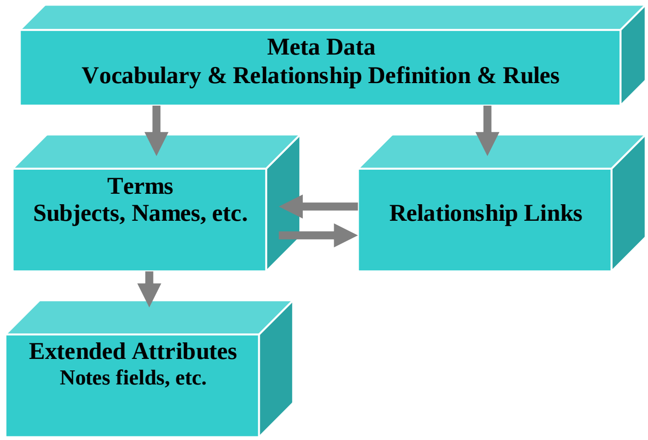
The content includes:

- Terms and definitions from environmental regulations and laws
- Glossaries, term lists and hierarchical terminology resources produced by EPA programs
- Glossaries, term lists, and hierarchical terminology resources from state and other partners
- The GEMET (General Multilingual Environmental Thesaurus) from the European Environment Agency, including the Americanized English version contributed by EPA

### *Tools*

The main tool of the EPA Terminology System is Synaptica by Factiva from Dow Jones, a commercial-off-the-shelf product to create, store, maintain, and distribute vocabularies. The functionality provided by the Synaptica tool is the main focus of this manual and of the Editors' Training Manual which is available from the Resources page.

**Figure 1: Terminology System High Level Data Model**




Used with permission of Factiva. This diagram is proprietary and not for redistribution.

The Terminology System is based on a data model that can accommodate various types of vocabularies from simple code lists to terms and definitions to complex hierarchies (see Figure 1). The Terminology System also contains metadata about each Vocabulary. The vocabularies contain terms which may be linked by one or more relationship types. Terms may have extended attributes such as note or source fields

Currently, there are two main types of vocabularies in the EPA System:

- Terms and definitions (non-hierarchal)
- Terms organized into hierarchies, such as taxonomies and thesauri

### *Governance*

Collaborative governance approaches are being developed that will support consistent development of vocabularies across EPA in order to promote search and re-use; and bring communities of interest together to create terminology, definitions, and mappings/documentation of differences. Several governance structures have been developed to date, and can be accessed via the Terminology Services web site.

### *Services*

- Machine-to-Machine Services

APIs and Web services are available that allow other systems to access the vocabularies managed in the Terminology System. For more information on how to get access to the Web services, see Section 11.2. For API and Web services documentation, see the Terminology System and Services Resources web site.

- People Services

A series of other services are available to support your vocabulary efforts. Individual or group training sessions can be provided tailored to the needs of your group. In addition, the Terminology Services team within the Data Standards Program is available to consult with you about the design of your vocabularies, to discuss appropriate governance structures and procedures, to discuss the integration of your vocabulary with other systems, to help with the import of existing vocabularies into the Terminology System, and to develop customized reports to support the management or publication of your vocabulary.

# 3.0 CREATING A VOCABULARY

A vocabulary is a grouping of terms that have something in common. Vocabularies may come from a particular subject area, such as drinking water; a document or event, such as a law or regulation that has been passed; or the work of a particular EPA program, project, stakeholder, or partner, such as a glossary from a particular EPA Regional Office.

Each vocabulary in the Terminology System is described in the *Vocabularies* file, a database (or series of Oracle tables) that manages the characteristics of each vocabulary. The *Vocabularies* file itself is treated as a vocabulary (or object class) under the Vocabulary of Vocabularies Taskview. Note that the Vocabularies file is not documented in the standard Synaptica documentation since it was developed specifically for the EPA implementation. In addition to keeping track of the vocabularies, the Vocabularies content can be used by user interfaces to present vocabulary-level information, such as a list of available vocabularies with publishers or stewards.

## 3.1 Entering Vocabulary Metadata

To create a new vocabulary, metadata about the vocabulary must be added to the System.

**Select the Vocabulary of Vocabularies Taskview. Click on ADD Synaptica menu bar. Select "Vocabularies" from the Object Class choices.**

*The page will refresh with the available sub-elements listed.*

The following sub-element fields may be completed:

| SUB-ELEMENTS NAME | DEFINITION |
|---|---|
| **Vocab Short Name*** | The short name used for pick lists. This field is limited to 30 characters. |
| **Vocabulary Name** | The full name of the vocabulary. |
| **Display Name** | The name that will be displayed to identify the vocabulary on the search results or tree browse. |
| **Vocabulary Type*** | The classification type of the vocabulary. See table in section 3.0. |
| **Description** | Information that describes the vocabulary and its purpose. |
| **Vocabulary Unique ID (UID)** | Contains the Unique Identifier (UID) for the vocabulary taken from the Object Class Management page. Allows changes to be made to the name of the vocabulary without impacting the link between the Vocabulary metadata and the vocabulary itself. |
| **Taskview** | Indicates the taskviews in which the vocabulary appears, separated by semicolons. |
| **Steward** | The person responsible for managing the vocabulary. |
| **Steward E-mail** | The e-mail address of the steward. |
| **Publishing Organization** | The organization responsible for publishing the vocabulary. This is often the organization in which the steward resides. |
| **Version** | The edition of the vocabulary. |
| **Source Creation Date** | The date the vocabulary was created. |
| **Source Modification Date** | The modification date of the vocabulary. |
| **Language** | The name of the language or languages of the terms in the vocabulary. |
| **Original Source** | The name of the original source of the vocabulary. This may be the same as the publishing organization. |
| **Namespace/URL for Source** | The URL of the original source, if it is available online. |
| **Alternative Name** | Another name by which the vocabulary is known. |
| **Client System** | The system or systems that uses the vocabulary |
| **Terms & Conditions** | Disclaimer of use, including copyright notices or limitations on secondary distribution of all or part of the vocabulary. |
| **Active Flag** | Indicates those vocabularies that are active and should be provided via the interface. Archival, in-process or migrating vocabularies which have not yet been checked by quality control processes should be kept from displaying by the Inactive option. At this point, it will be the same as those vocabularies that are in the Active Task View. A=Active; blank= Inactive |
| **Categories** | The topic or topics of the vocabulary selected from a controlled pick list. |

*Required fields

**Select the category(ies) from the list of categories that best describes the vocabulary.** By holding down the ctrl key, more than one category can be selected. **Click on ADD ITEM.**

## 3.2 Specifying the Vocabulary Types

In addition each vocabulary is given a vocabulary type, which is closely related to the structure. To date, the following vocabulary types have been defined. If you are unsure of the vocabulary type, discuss it with the vocabulary steward.

| Vocabulary Type | Definition |
|---|---|
| **Glossary and Key Word List** | **Terms from a subject, field or project which may have definitions.** |
| **Taxonomy** | **Terms organized into broader-narrower relationships based on some presumed natural order.** |
| **Thesaurus** | **Terms related by broader-narrower, synonymous, associated (related) and other more specific relationships based on international or national standards.** |

## 3.3 Creating an Object Class

### 3.3.1 Naming the Vocabulary

In addition to adding the vocabulary to the Vocabularies file, the vocabulary must be created as an object class in Synaptica.

**Click on ADMIN from the Synaptica menu bar.**

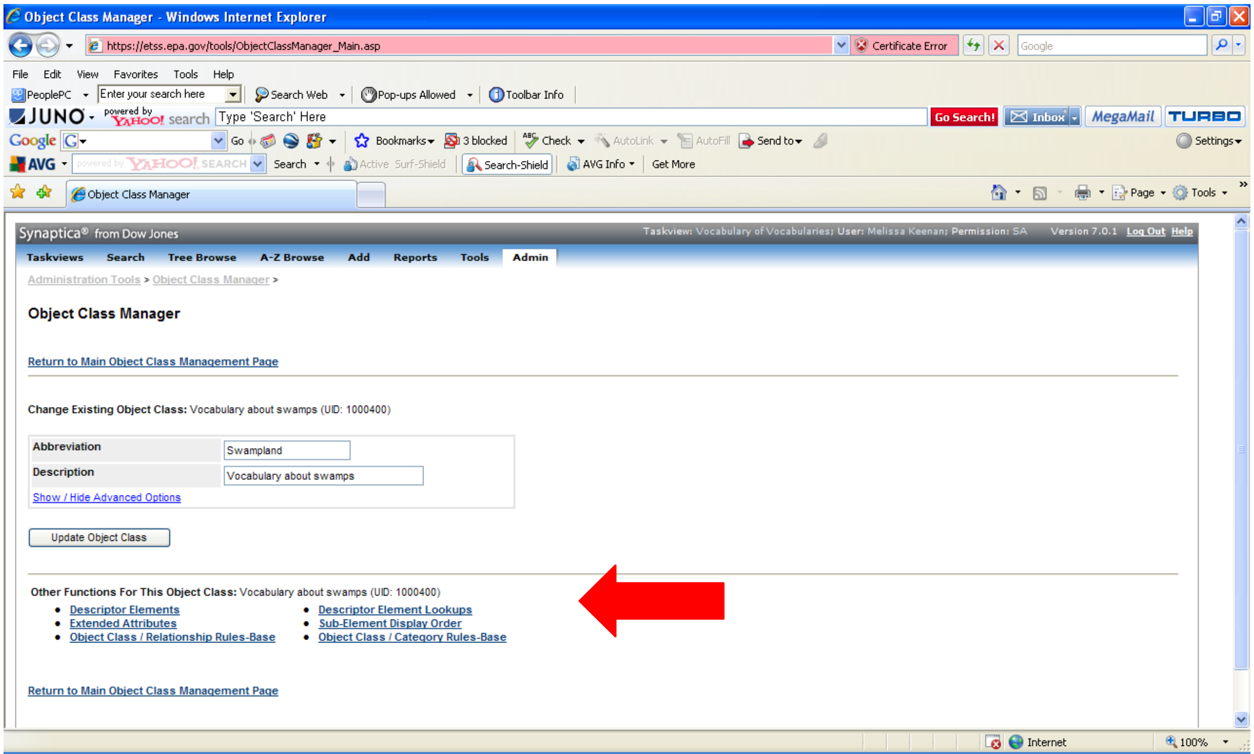
**Click on Object Class Manager.**

**Click on the ADD button beneath the box listing existing object classes**

**Enter the Abbreviated name for the vocabulary and the longer description. The content of these fields should match the equivalent fields in the Vocabularies file. Click Add Object Class.**

The Abbreviated or Short name must be unique. It should be no more than 30 characters. Since this name will be displayed on all vocabulary pick lists, it should be as descriptive as possible. Some consistency has been established in abbreviating terms like Env. Please consult the current list of vocabularies for guidance.

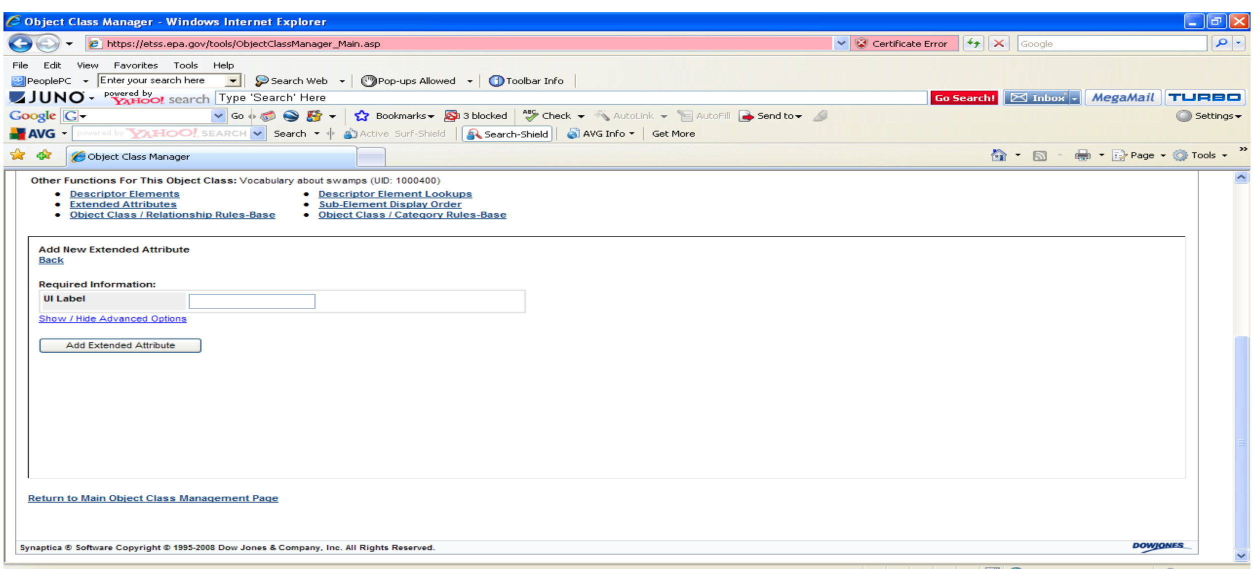
After the object class has been added, there are other functions that can be applied through the Object Class Manager. The functions include extending the attributes for terms in the vocabulary, specifying relationships and their rules, creating category rules, establishing display order for attributes, etc. These functions will be hyperlinked in the Object Class Manager after an object class has been added or selected for edits.




### 3.3.2 Selecting/Creating Extended Attributes (Sub-elements)

Vocabularies are created with only two required fields, the term and the unique identifier for each term (UID). However, the Terminology System has other attributes (or sub-elements) that are commonly used.

**Click on the Extended Attributes hyperlink at the bottom of the current (Object Class Manager) page.**



**From the list of attributes, click on the attributes that should be included in the new vocabulary. If no attributes are listed, select ADD and enter the attribute name.  Repeat this process for each attribute to be included.**

Commonly used extended attributes include Def 1 through Def 5, Scope Notes, Source and Editor Notes. Note that glossaries, by definition, must have at least one definition, requiring at least a Def1 attribute. Remember that maintaining a similar structure across vocabularies, particularly those of a certain type, will enhance cross-vocabulary searching and re-use of term records.

In addition, the steward may have additional attributes (sub-elements) that are not required or that have not been defined before within the Terminology System. It is important to first analyze the meaning and use of the attributes that the steward is proposing to see if the existing attributes can be used.

### 3.3.3 Selecting/Creating Relationship Types

**Click on Object Class/Relationship Rule Base hyperlink to select the types that will be included for this vocabulary.**

Taxonomies and thesauri by their very definitions have relationships between terms, so a relationship type is required for vocabularies of these types. Glossaries and keyword lists may or may not have relationships between terms.

The following table shows the Relationship Types that have been created to-date. The behavior of those terms in result displays is described in the right-most column.

| Relationship Type Code | Relationship Name | Definition | Results display |
|---|---|---|---|
| USE | Use | The relationship between a non-preferred term and a preferred term for the same concept. | Term included in default alpha display followed by (NPT). Not displayed on default hierarchical displays. |
| UF | Use For | The relationship between a preferred term and a non-preferred term for the same concept. | Term included in default alpha and hierarchical displays. Relationship shown in full record and with a special report. |
| CB | Coded By | Full Term for reciprocal coded value | Term included in default alpha and hierarchical displays. Relationship shown in full record and with a special report. Behaves like a preferred term in the UF-USE relationship. |
| CF | Code For | Coded value for the reciprocal full term | Term followed by (NPT). Included in default alpha displays but not hierarchical displays. Relationship shown in full record and with a special report. Behaves like the non-preferred term in a UF-USE relationship. |

| Relationship Type Code | Relationship Name | Definition | Results display |
|---|---|---|---|
| AB | Abbreviated By | Full term associated with reciprocal abbreviation | Term included in default alpha and hierarchy displays. Relationship shown in full record and with special report. Behaves like an RT relationship; neither term is non-preferred. |
| AF | Abbreviation For | Abbreviation for reciprocal full term | Term included in default alpha and hierarchy displays. Relationship shown in full record and with special report. Behaves like an RT relationship; neither term is non-preferred. |
| RT | Related Term | Identifies terms with associated meanings | Term shown in all default lists. Relationship shown in full record or with a report. |
| NT | Narrower Term | Relationship between a term and a subordinate term | Term shown in all default lists. Relationship shown in hierarchical display. |
| BT | Broader Term | Relationship between a term and its superordinate term | Term shown in all default lists. Relationship shown in hierarchical display. |
| SY | Synonym | Identifies terms with identical or equivalent meaning. | |
| FNTT | Facet Name Top Term | Relationship between a facet term and its actual top term (Note: this field was created for interoperability purposes with the read-only interface) | Term shown in all default lists. Relationship shown in hierarchical display. |
| ATT | Actual Top Term | Relationship between a top level term in a taxonomy and its facet name term (Note: this field was created for interoperability purposes with the read-only interface) | Term shown in all default lists. Relationship shown in hierarchical display. |

**If there is a relationship that will be included in the vocabulary but it isn't on the list, you must first go back to the Admin page, click on Semantic Relationship Types and add the Rel Type you need.**

*If the Rel Type is identified as a reciprocal type, the system will prompt you for the name of the Rel Type for the "opposite side" of the relationship. For example, if BT were added, it would prompt for NT as the reciprocal.*

For more information on adding Relationship Types, refer to the Synaptica documentation on the Terminology System and Services Resources web site.

### 3.3.4 Managing Sources of Term Definitions

Some vocabularies may include sources for the definitions enclosed in brackets at the end of each definition. In order to keep the definitions as short as possible, editors are encouraged to abbreviate the sources. If the source is another vocabulary in the Terminology System, the short name from the Vocabularies file should be used. For example, in the Web Taxonomy, definitions have been copied and pasted from the Terms of the Environment. In this case, the short name for the Terms of the Environment, “Terms of Env”, is used as the source of the definition, which appears at the end of each definition in brackets, e.g., [Terms of Env]. If the original source is not an EPA Terminology System vocabulary, a unique short name should be created. The full name and its abbreviation should be entered in the Definition Source file in the Vocabulary of Vocabularies taskview. The list of short names should be considered when creating an abbreviation so that similar terms are abbreviated consistently, for example Env for Environment.

## 3.4 Entering Terms into the Terminology System

### 3.4.1 Preparing Vocabularies for Entry into the Terminology System

Before inserting terms into the Terminology System, the term set should be reviewed for relationships that are embedded in terms or definitions. These embedded terms may need to be added as separate terms and relationships created between the original term and the new term.

In general, if the embedded term appears following the term, with or without parentheses, the embedded term should be removed from the term and added to the vocabulary as a separate term. For example, a term list could have “Environmental Protection Agency (EPA)” as a term. When preparing the list for entry, “(EPA)” should be removed from the term, added as a new term, and the relationship AB-AF created between the two terms. Care should be taken to ensure that the integrity of the original term is retained when removing the embedded term.

If the embedded term occurs in the definition, it can remain in the definition, but it should also be added to the vocabulary as a separate term. Again, care should be taken to ensure the integrity and readability of the definition when deciding how to remove an embedded relationship. For example, a definition for the term “Maximum Contaminant Level Goal” might be “MCLG is usually the starting point for …”. When preparing the list for entry, “MCLG” should be added as a term, and the relationship AB-AF created between “MCLG” and the full term “Maximum Contaminant Level Goal”. Removing the acronym from the definition is optional, but the approach should be consistent across the entire vocabulary.

Embedded acronyms and abbreviations are the most common embedded terms. However, terms may also include embedded “see also” or “use” references to other terms in the list. These references should also be removed and expressed as specific relationships between terms. Generally, the appropriate relationship for “see also” is the

RT (related term) relationship. “See” or “use” references in the original should be expressed as USE/UF (Use/Use For) relationships, unless the more specific AB-AF and CB-CF relationships apply. The procedures for adding terms, relationships and attributes are provided in the Editor’s Manual. More information on Relationship Types can be found above in section 3.3.

### 3.4.2 Adding a Vocabulary Directly into the Terminology System

Small vocabularies or existing vocabularies transferred from paper are best added by keying the terms directly into the System. The procedures for adding terms, relationships and attributes are provided in the Editor’s Manual.

NOTE: Terms cannot be added until the vocabulary (object class) has been created, its metadata has been entered as described in section 3.1, vocabulary assigned to a Taskview as described in section 4.2, assign user to vocabulary as described in section 5.1, and assign user roles and permissions to Editor I or higher as described in section 5.7. Additionally, once the vocabulary has been created, it should retain its own taskview with viewing limited to the creator and the quality control staff and considered inactive (note the Active Flag functionality in Section 3.1 table) until it has been approved. At this point, it may be assigned to an established or newly created taskview.

### 3.4.3 Importing Terms into an Existing Vocabulary

New vocabularies that exist in spreadsheets or vocabularies that have been maintained in other systems are often best added using the System’s import options.

The vocabulary types indicate three basic types of vocabularies – taxonomies, thesauri, and glossaries. When you determine which vocabulary type you are dealing with you can select the appropriate structure for importing an existing vocabulary.

When importing a glossary, only the term file is needed. The file should include all the attributes needed for a basic term and definition file.

Minimally, the structure for a term file is:

[Descriptor (Term)] [Object Class (Vocabulary)] [attributes or sub-elements such as source or editorial notes]

The system will automatically include a language field, the date modified and the date created. The column headings or tags must match the names in the brackets above. The column headings or tags for the attributes or sub-elements must match the names of the attributes or sub-elements as created in the Object Class Manager.

If you encounter an attribute that isn’t covered but that should be retained when importing the existing vocabulary, the attribute can be added to the template. However, before importing you must create the vocabulary with all the attributes and sub-elements that are in the import file. Any attributes that are not included will either be by-passed in the import or result in an error message. To add an attribute, see Section 3.3.2 above.

When importing a hierarchical vocabulary such as a taxonomy or thesaurus, both a term file and a relation file are needed. These files should include all the attributes needed for a basic hierarchy, thesaurus or taxonomy.

The structure of a relation file is:

[Descriptor] [Object Class] [Rel Type] [Target Term] [Target Vocab Short Name]

The relation file must contain both reciprocal relationships. The column headings or tags must match the names in the brackets above.

Vocabularies can be imported as Excel (XLS), Comma-Separated-Variable or XML files. The most common types will be Excel and Comma-Separated-Variable (CSV). The latter is created from the Save-As/Format menu on the Excel tool bar. In order to import a file successfully, the worksheet of an XLS file or CSV file created in Excel must be named "Sheet1". Any other names will prevent the import process.

**Once the files have been created, click on Tools and select File Import Manager.**

File import occurs in three phases – upload, staging and verification.

The term file must be imported first in order to create the records for the terms for which relationships will be established by the relation file.

**Enter the path for the file you want to save to the server or browse the directories to locate it. When the file has been located, click Upload.** *If the file is successfully copied an appropriate message will be displayed.*

The ability to upload files directly may be dependent on the size of the file. Generally, large files may need to be sent via ftp simply because of the speed of transfer.

It is possible to import a large file in the background while continuing to do other work. **To do this, click Tools from the menu bar and select Monitor Import Processes**. If you have any questions about file sizes, contact NCC. You can always try the import and cancel if the direct process is taking too long.

This function copies the file from this location to the staging directory on the Terminology System server. As part of the staging process, the contents of the file are parsed. This action maps the incoming file structure and column headings to the data model described in the vocabulary definition that you created above.

When the upload successful message appears, **click CONTINUE** to move on to the staging phase which parses the structure of the import file and matches it against the vocabulary definition that you've created. If errors occur, check the import file against the vocabulary metadata and reprocess.

**In Step 2, select the import file from the pick list. Click CONTINUE.**

*Error messages may be displayed indicating that the import structure does not match the structure as defined in the Object Class Manager. If this occurs, review the two and go back to the Object Class Manager and redefine the attributes, elements, etc. or correct the import file. The most common error is a mismatch between the name of an attribute in the import file and the name of the attribute in the definition of the vocabulary in the Object Class Manager.*

**If Step 2 is successful, click CONTINUE.**

Step 3 validates the file against the rules, in particular the rules for relationships.

If the *file is successful you will get the message Process Complete and statistics about the number of terms and relationships that have been created. These should be checked against the import files to make sure no information has been dropped.*

### 3.4.4 Updating and Deleting Terms through Import Module

Terms can be updated and deleted through the import module. In order to update or delete terms that are already in a vocabulary through the import module, you must have the UID for each term.

Minimally, the structure of the file should be:

[UID] [Descriptor] [Object Class] [The attribute field that will be changed must be included (e.g. to delete the [Active Status] attribute must be used).

Here is an example:

| UID | Descriptor | Object Class | ACTIVE_STATUS |
|---|---|---|---|
| 1001861 | annual landscaping | Test Glossary | Deleted |
| 1001862 | beneficial landscaping | Test Glossary | Active |
| 1001862 | Biennial | Test Glossary | Deactivated |

In the above example, each descriptor had active status in the Terminology System but the status will be changed to the values in the ACTIVE_STATUS field above when imported into the Terminology System. When the import is complete, you will receive a summary of the changes made. In this case, the term "annual landscaping" will be deleted and "biennial" will be deactivated.

The process for importing update and delete files includes the same 3 phases identified in Section 3.4.

## 3.5 Creating Training Vocabularies

Training vocabularies are created for every user account. The training vocabularies are created for purposes of training new users whether in an individual or group setting. All training vocabularies can be found in the TRAINING TASKVIEW.

The naming convention for training vocabularies is
First initial Last Name Vocabulary Type
For example, “JDoeHierarchy” or “JDoeTerm-Definition”.

Only those with System Administrator (SA) permissions are allowed to create a vocabulary. This includes the Coordinators, the Terminology System contractor support staff, and selected stewards/editors.

To create a training vocabulary, **select the Training Taskview. Select ADMIN in the Synaptica menu bar. Click on Global Replicator. Select the GLOSSARY TRAINING object class for the glossary vocabulary type or TAXONOMY TRAINING object class for the taxonomy (hierarchical) vocabulary type from the drop down box next to the text“Replicate from this Object Class”.**

Follow the naming convention above to **enter the Abbreviated Name and Description. Select STRUCTURE AND DATA FOR REPLICATION TYPE, Intra-Object Class Relationships Only will be set by default. Then Click Continue.**

*The Terminology System will refresh to display a box with the details of the training vocabulary as entered, including the number of items in the new file as well as the number of relationships. If this information is correct* **Select the REPLICATE button.**

*The copy will automatically be placed in the Training Taskview.*

# 4.0 CREATING A TASKVIEW

Taskviews are views or windows on the system that allow different users to have different kinds of access to the same vocabulary. The taskviews can be created around vocabulary type, for example glossaries and key word lists versus taxonomies; around topics such as all water-related glossaries and key word lists and taxonomies; around user groups such as trainees versus active users; or around status such as an approved or published vocabulary versus one that is in progress.

The basic taskviews have already been created. The taskviews are created on an as needed basis to meet specific needs of the users, system developers and coordinators. Here is a list of the basic taskviews:

- Active Taskview - contains all the actively used vocabularies.
- Archive Taskview - contains all the vocabularies that were at some point in use but have been determined by the administrators as out-dated or no longer in use

- Training Taskview - contains all the training vocabularies for the users of the system. Each user has at least two training vocabularies which are of two different vocabulary types - Glossary and Key word list and Taxonomy. See section 3.5 for more information on training vocabularies.
- Testing Taskview - contains vocabularies for testing different functions within the system without affecting vocabularies that should not be modified; usually available to users with Administrative permission only.

## 4.1 Naming Taskviews

The first step in creating a taskview is to name it and provide a description.

**From the Terminology System homepage, select any Taskview, and then click on ADMIN. Click on Taskview Manager. Enter the Abbreviated Name for the Taskview and a description.**

The abbreviated name should be explanatory but relatively short since it will be used on the interface as the main means of browsing and accessing the system.

**Click on Add Taskview.**

*The system will note "new taskview added"*

## 4.2 Assigning a Vocabulary to a Taskview

In order for terms in a vocabulary to be reviewed, searched, added or otherwise managed, the vocabulary must be assigned to at least one taskview.

**Select any Taskview then click on ADMIN. Click on Taskview Manager. Under Existing Taskviews, select the Taskview to which the vocabulary should be assigned. Under Edit Existing Taskview Configuration, click on Add/Delete.**

The Taskview Object Class Maintenance pop-up window will appear on the screen. There will be a complete list of all the available vocabularies (object classes).

**Select the check box next to the object class(es) you want to include in the Taskview. Click Update, the window will refresh to reflect the changes. Close the window.**

The Taskview Manager screen will now show the object classes added to the Taskview under "Object Classes Included". A taskview may contain more than one vocabulary. The same vocabulary can be included in more than one taskview.

Note that a vocabulary must be defined before it can be added to a taskview, but it doesn't need to have content.

When a vocabulary is under development, it is generally advisable to create a taskview that contains only that vocabulary. This will make it easier for the steward and editors working on the vocabulary to easily locate the vocabulary and the permissions can be constrained so that the general public and those who are not involved in the vocabulary development cannot see the vocabulary until it is has passed through quality control processes, has been approved and published.

The Active Taskview is being used to generate the content for the read-only interface to the Terminology System and Services. Therefore, a vocabulary that has been published, and which should be available through this interface, should be included in the Active Taskview. The vocabulary's own taskview may be retained for the benefit of the steward and editors.

## 4.3 Deleting Taskview

When a taskview is no longer needed, for example, if the taskview has served a temporary location for a vocabulary in development, the taskview should be deleted.

**Select any Taskview, then click on ADMIN. Click on Taskview Manager. Under Existing Taskviews, select the Taskview which needs to be deleted. Underneath a box containing the taskview name and description, click on the DELETE THIS TASKVIEW button.**

# 5.0 ASSIGNING USERS TO VOCABULARIES

To make vocabularies visible to users, the Coordinator must assign the user to that vocabulary within a taskview. This section provides procedures for new users as well as existing users.

## 5.1 Adding a User to a Vocabulary within a Taskview

**To add a user to a Vocabulary for that Taskview, click on Add/Delete User.**

*The System will display all the User IDs that have been granted in the system.*

**Select one or more user IDs and click Update. Close this window.**

## 5.2 Deleting a User from a Vocabulary within a Taskview

**To delete a user from a Taskview, click on Add/Delete User.**

*The System will display all the User IDs that have been granted in the system.*

**Select one or more user IDs and click Delete. Close this window.**

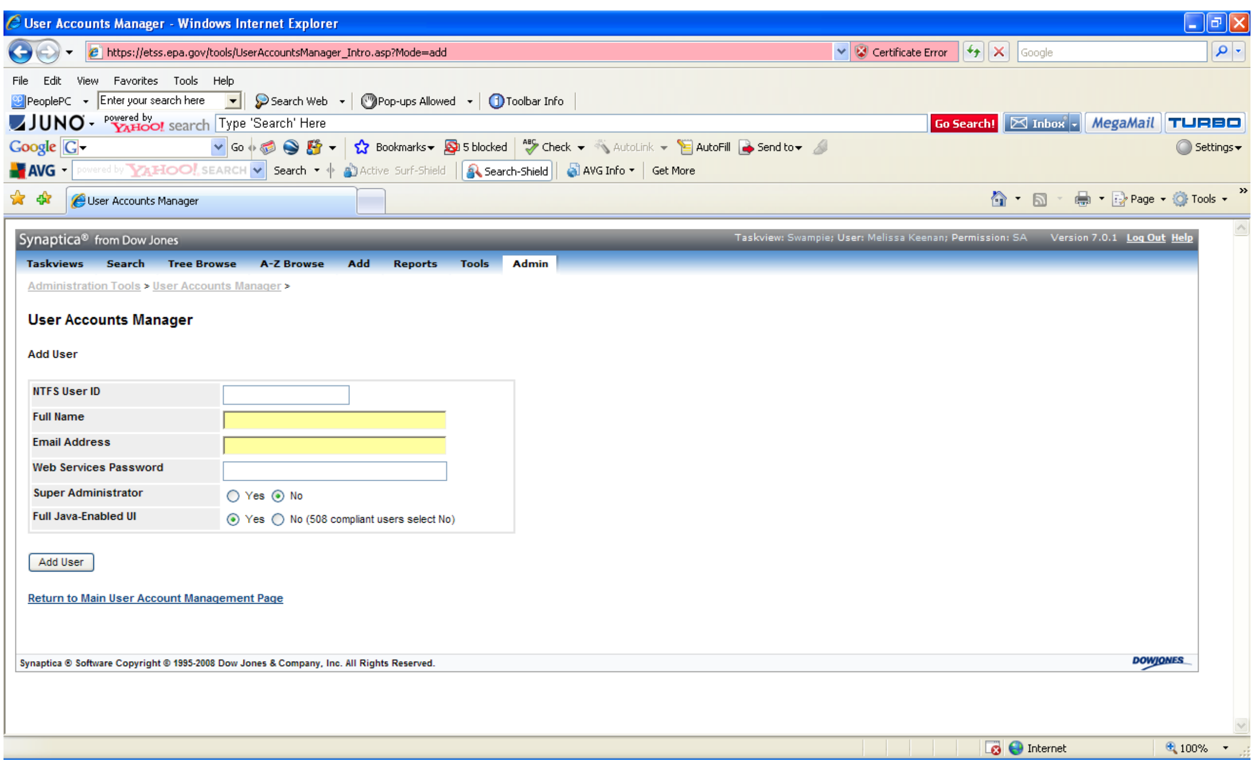
## 5.3 Tracking Terminology System and Services Customers

When a user requests access to the Terminology System and Services, the Coordinator collects key information about that user and his or her use of the system. An example of the Customer List spreadsheet is presented in Appendix C. This information helps when providing customer support and when providing statistics about who is using the Terminology System and Services and for what purposes. Periodically, this list should be reviewed against the user accounts in the Terminology System and the Windows accounts maintained by NCC to ensure that all aspects of user access are synchronized.

## 5.4 Creating User IDs and Passwords

The creation of user IDs and passwords is a multi-step process. To begin the process, the Terminology System Coordinator must determine if the user is internal or external to EPA. If the user is external to EPA, then the user must secure remote access to the EPA network. The next step requires setting up a Windows ID and password by the UserName/Password Administrator at NCC (aka Windows Administrator in Appendix D). This process is detailed in Appendix B. The second step involves the creation of a Terminology System account and the establishment of appropriate permissions for particular taskviews and vocabularies.

**Once the user has received the Windows ID and password needed for the Terminology System, select a taskview. Click on ADMIN. Select USER ACCOUNTS to access the User Accounts Manager. Click on ADD.**



**Enter the Windows user name, usually the first initial followed by the last name (e.g., jsmith) as the NTFS User ID.**

**Enter the person's full name and e-mail address.** The e-mail should come with the request or the e-mail from NCC.

**If the person should have SA privileges, click on the radio button on the user account screen.** The default is for non-SA.

Go back to the User Accounts screen to create additional accounts.

## 5.5 Deleting User Accounts

To delete a user account:

**Select a Taskview, then click on ADMIN. Select User Accounts. Select a UserID from the pick list. Click Delete.**

*The system will confirm deletion.*

## 5.6 Creating Passwords for Web Services

In addition to having general access to the system, any user requesting access to Web Services must have a special password. Web Services passwords must be assigned by a Terminology Services Coordinator.

**Select any Taskview to enter the system, then click on ADMIN. Select User Accounts. Select a USER ID from the pick list. Click EDIT and then enter a Web Services Password (usually the same as the login password). Click UPDATE.**

*The User Account Modification Page will state that the user account was modified.*

***For security purposes, the web services password will always be blank when displaying a user account record, even if the user has a web service password assigned.*** *Therefore, an indication of whether the user has a web service password should be included in the Customer List spreadsheet (see Section 5.1 and Appendix C). To change a password, type a new one in the blank web services password field and it will immediately override the previous password.*

## 5.7 Assigning Roles and Permissions

The Terminology System profile dictates which vocabularies a user can access and what the user can do with each vocabulary. Levels of access and permission ensure that the changes to the Terminology System are performed by the appropriate people and as part of an agreed upon workflow. These profiles are created by the Terminology Services Coordinator in collaboration with the vocabulary steward.

### 5.7.1 Description of Roles and Functions

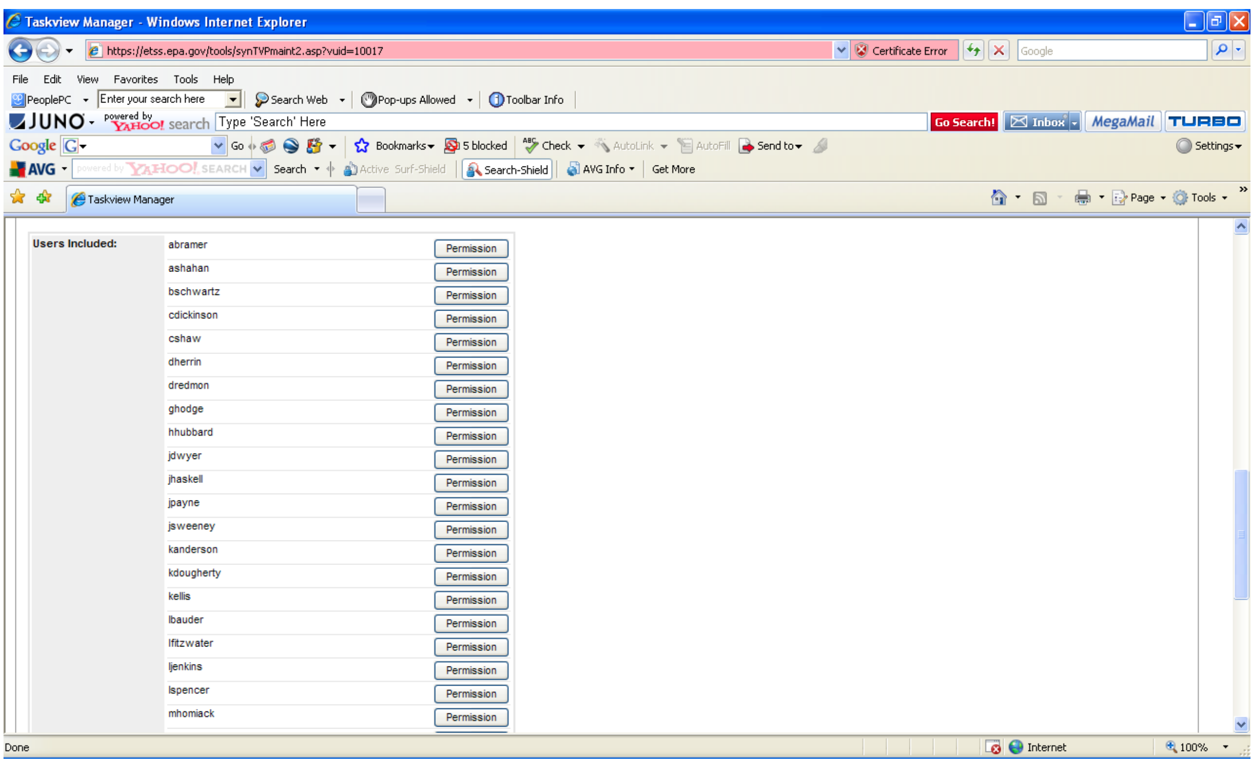
The following list provides a general description of the roles and general functions mapped to the equivalent Synaptica description that can be performed.

| *General roles and functions* | *Synaptica description of roles and functions which are available via pick list user permissions in the Taskview Manager* |
|---|---|
| **"Public"**<br>Read Only Access depending on taskview<br>Default Level Access<br>Comment view standard comment box | **Read Only**<br>Read Only Access |
| **Editor**<br>Add and delete terms<br>Add and modify relationships<br>Add, delete, and modify other content such as definitions<br>Public Permissions | **Editor III**<br>Merge items<br>Clone items<br><br>Reassign Items<br>Editor I, II Access<br>Indexer I, II, III Access<br>Lexicographer I, II, III Access<br>Read Only Access |
| **Administrator**<br><br>Set up vocabulary metadata<br>Replicate vocabulary models<br>Add data elements to vocabularies<br>Control taskviews (user profiles)<br>Set permissions<br>Editor Permissions | **Administrator I**<br>Edit the taskview profile (TVP) metadata For TVP's user is privileged to access<br>Editor III Permissions |
| | ***Other permissions that are available but currently not being used*** |
| | **Indexer I**<br>Add INTER-object relationships (but not INTRA-object relationships)<br>Read Only Access<br>**Indexer II**<br>Edit/Delete INTER-object relationships (but not INTRA-object relationships)<br>Indexer I Access<br>**Indexer III**<br>Add/Edit/Delete INTRA-object relationships<br>Indexer II Access<br>**Lexicographer I**<br>Add items (except for approved items)<br>Indexer III Access<br>**Lexicographer II**<br>Edit Items<br>Lexicographer I Access<br>**Lexicographer III**<br>Delete items (except locked records)<br>Lexicographer II Access |

| *General roles and functions* | *Synaptica description of roles and functions which are available via pick list user permissions in the Taskview Manager* |
|---|---|
| | **Editor I**<br>Add items with approved status and promote unapproved terms to approved<br>Lexicographer III Access<br>**Editor II**<br>Edit/Delete locked records<br>Lexicographer II Access |

The vocabularies, roles, and permissions are controlled by taskview and vocabulary. The taskview provides flexibility in that a person can have editor's access (creation and modification privileges) to one vocabulary and read-only access to another, and keep some vocabularies completely hidden from public view pending quality control. The taskview allows the same user permissions to be granted to a user for all vocabularies within the taskview with a single command.

**To assign Permissions to the User IDs, access the Taskview Manager page. Select the taskview you need. Scroll down to see the Users Included box at the bottom of the page. Click on the Permission box beside the user names.**




*The various Permissions are displayed in a pick list for each object class in the taskview.*

**Select the appropriate permission from the list.**

The default is Read-Only access.  Alternatively, the same permission can be given to all users at once.

**Click Update at the top or the bottom of the list.**

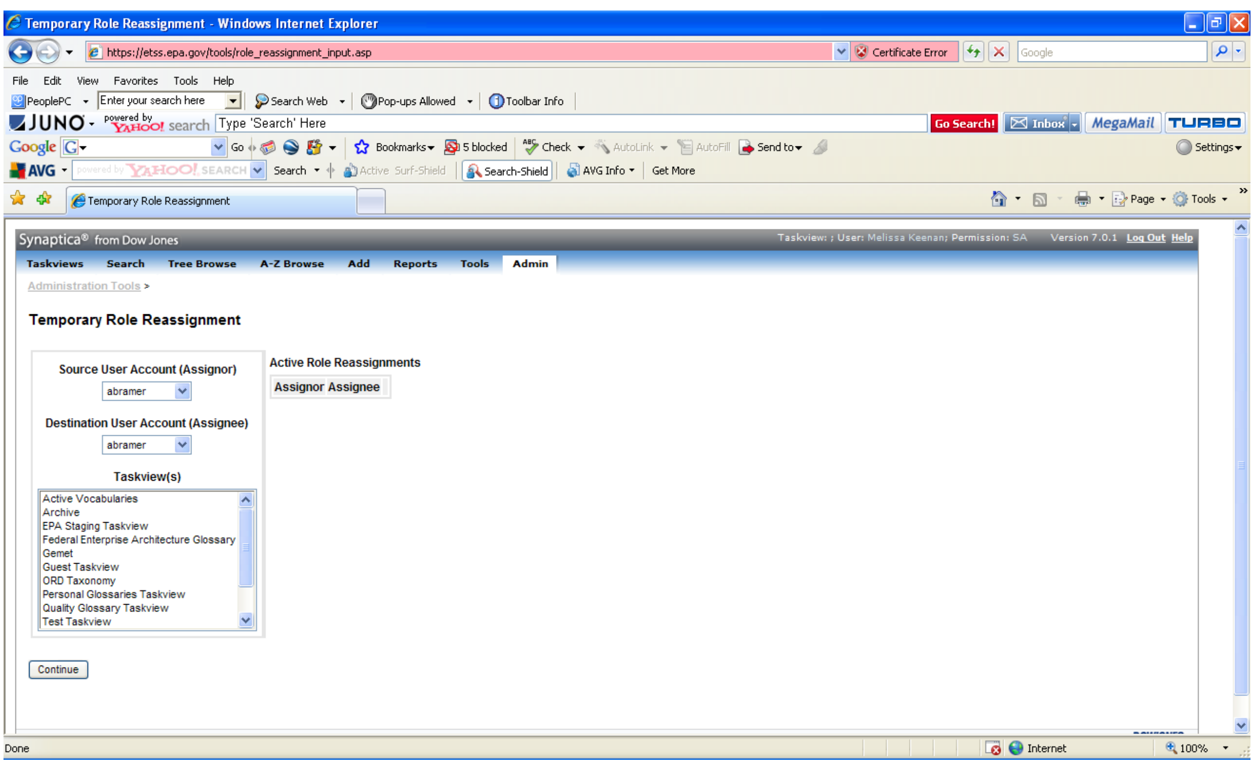
The change or addition of the User ID or the permission is effective immediately.

In order to perform the role of the Coordinator the person must be assigned Administrator or Super-Administrator permission on the vocabulary. The Coordinators should have this status for every vocabulary in the system. Generally, the latter permission is done by giving the Coordinator’s accounts Super-Administrator permission which is system-wide.

### 5.7.2 Temporary Role Reassignment

The Terminology Services Coordinator has the ability to set a temporary role reassignment between two user accounts for a taskview.  The Temporary Role Reassignment function is under the Administration Tools.  The temporary role reassignment function gives the Coordinator the ability to grant a user the permission level of another user for the selected taskview. This function is helpful to temporarily cover for Administrators or Editors during periods of absence.

**Select a taskview to enter the system and click on ADMIN.  Select Temporary Role Reassignment.  Select the Source and Destination user account from the pick lists.  Select one (or more) taskview(s). Use the CNTRL key if more than one. Click CONTINUE.**



*The System displays the permission level for the Source User Account for the taskview(s) selected.*

**Click REASSIGN**. *The System responds with a reassignment complete confirmation.*

Now the destination user account has the permission level of the source user account for the taskview selected.

To set the role back to its original state, **select a taskview and click on ADMIN. Select Temporary Role Reassignment.** There will be an Active Role Reassignment table with all the active role reassignments. **To reassign, click the RESTORE button.**

*The System responds with a restore complete confirmation.*

### 5.7.3 Clone Permissions

The Clone Permissions function operates similar to the Temporary Role Reassignment function except that it is not a temporary change. The Clone Permissions function should only be used if you want a user account to permanently mirror another in the same taskview. This function is useful to ensure that assignments have been made for people who are serving as permanent backups for Coordinators, administrators or stewards.

**Select a taskview to enter the system and click ADMIN. Select Clone Permission. Select the Source and Destination user account from the pick lists. Select one (or more) taskview(s). Click CONTINUE.**

*The System displays the permission level for the Source User Account for the taskview(s) selected.*

**Click CLONE**. *The System responds with a clone complete confirmation.*

# 6.0 OTHER VOCABULARY MANAGEMENT FUNCTIONS

## 6.1 Deleting a Vocabulary

Editors can delete or deactivate terms from a vocabulary, but only the Administrator (or the Coordinator) can delete an entire vocabulary.

**To delete a vocabulary, click on ADMIN and click on the Delete Complete Object Class link.**

**Select the Object Class from the drop down menu to be deleted. Click Continue.**

*The System display several confirmation messages to make sure that you really want to delete the vocabulary.*

It will also suggest that you consider running a report that saves the content in XML or CSV for easy re-creation. The file can also be copied before deleting using the Global Replicator function and assigning the resulting file a new name (See section 6.2.)

In addition to deleting or renaming a vocabulary from the Object Class Manager, the vocabulary should be deleted or renamed in the Vocabularies file.

## 6.2 Copying a Vocabulary

Copying a vocabulary is most valuable if you want to archive a version before beginning maintenance or if you want to replicate vocabularies for training purposes. Copying a vocabulary can include only the structure or the structure and terms or the structure and all its relationships and sub-elements.

**To copy a vocabulary, click on ADMIN and select Global Replicator.**

**Select the vocabulary you want to copy from the pick list. Provide the new name and description. If you want to copy just the structure, meaning all the attributes, relationship types, sub-elements, etc., click the STRUCTURE radio button. To copy the entire vocabulary under a new name, select STRUCTURE AND DATA. There is also an option to copy only preferred terms. Click CONTINUE.**

The Terminology System copies the vocabulary as instructed and reports back on the number of terms in the new file as well as the number of relationships. The copy will automatically be placed in the same taskview as the original. However, you can assign the copy to another taskview and then delete the vocabulary from the original taskview into which the copy was placed.

## 6.3 Deleting Attributes and Relationship Types

As stated above, two basic vocabulary structures have been developed. If you use the example structures or copy an existing vocabulary, you may find that there are unnecessary attributes or sub-elements in the new vocabulary that have been created in the process. To clean up the display for maintenance and to make the sub-element list shorter for users, it is recommended that you delete any unnecessary attributes. In order to delete any unnecessary attributes from copying the entire vocabulary, make sure there is no data in the attribute field that is to be deleted.  The system will not allow an attribute to be deleted if the field contains data.

**Click on ADMIN and then select Object Class. Select the specific Object Class.**

*The metadata about the vocabulary is displayed.*

**Click on the Attributes link and the attributes are displayed. Select the attribute or attributes that you want to delete and click on [del].**

*The list of attributes is redisplayed with the deleted attribute(s) eliminated.*

**To delete Relationship Types, select Relationship Types and add or delete the coded value. If you add or delete a reciprocal relationship, the opposite type will also be added or deleted.**

**To delete Sub-elements, select Sub-elements and add or delete.**

Note that in all cases, the only elements, relationship types or attributes that can be selected are those that exist in the system. In order to change the options available, return to the ADMIN page and select the appropriate function.

# 7.0 CREATING/SAVING REPORTS

## 7.1 Creating Reports

Reports may be created to provide the content of an entire vocabulary to a user, to present a hierarchy of browsable terms for a web page, or to illustrate the presence or absence of a term or similar terms in a vocabulary.

Report types available in the Terminology System include Alphabetical, Hierarchical, Exception, Tabular, Term Event, and Event Statistics. Each report may be used in a variety of ways to access information about the vocabularies contained in the System. Reports may be saved to the System and re-run. Reports may also be saved to an individual computer.

Editors and stewards can create their own Hierarchical, Alphabetical and Exception reports. Instructions on how to create reports are contained in the Synaptica documentation and in the Editors' Training Manual. Only System Administrators can create the Event Log Detail and the Reporting Events reports. Instructions for creating those reports are provided in Section 7.4 below.

## 7.2 Saving Reports

At the end of each report and above the "Create Report" button there is a check box labeled "Save selected report criteria with the following name:" followed by an entry window.

After checking the box the entry window will activate and the user can enter the name (see section 7.3) by which they would like to save the report criteria to recall later. When you click the Create Report button the report will be automatically saved to the saved report log.

To recall a report, you must be logged into the Taskview for which the report was created.  Select the report type for the saved report and select the open saved reports button.

The table shows each saved report. The functions can be interpreted based on the naming convention described in Section 7.3.  You have the option to Open, Run, Delete, or Schedule the report.  Please note that a scheduled report should not use the 31st, 30th, or 29th of the month if the report is set to run monthly.  This will cause an system error because these dates do not excess for every month of the year, therefore the 1st of the month at 12:00am should be used.

Reports that may be of general value can be saved and made generally available to all Editors under Saved Reports. Editors should be informed of new saved reports that might be of value to them and they should be encouraged to review the saved reports before developing a new report.

## 7.3 Report Naming Conventions

Report naming conventions serve as a template for anyone naming or retrieving reports in the Terminology System. The purpose of naming conventions is to allow reports to be named in a consistent manner so they may be retrieved and utilized more easily across the organization.

**Example: MS_WholeWebTax_Html**

Explanation:

The prefix "**MS**" is used to note that this report is a master, one that is rerun time and again. If a report does not meet master criteria, the "MS" would not be included in the report name. It is placed first so that the master reports are easy to find and differentiate from other reports.

The second part of the report name in the example is "**WholeWebTax**". This part is intended to contain a brief description of the report, or alternatively the purpose for the report, including the vocabulary used. This part of the name should not exceed 20 characters.

The third and final part of the report name in the example is "**Html**". This part should indicate the output format of the report. The output options for reports in Synaptica include html, xml, and tabular (CSV). The suggested abbreviations are "Html", "Xml", and "Tab" respectively.

Note that there are no names, dates or times in the naming conventions for reports because these data are already saved in the Terminology System as soon as a report is created. This feature allows differentiation between reports with identical names created by different individuals or departments. Report type (Alphabetical, Hierarchical, etc.) are also not included in the report naming as the reports are only retrieved in the Terminology System by way of their type.

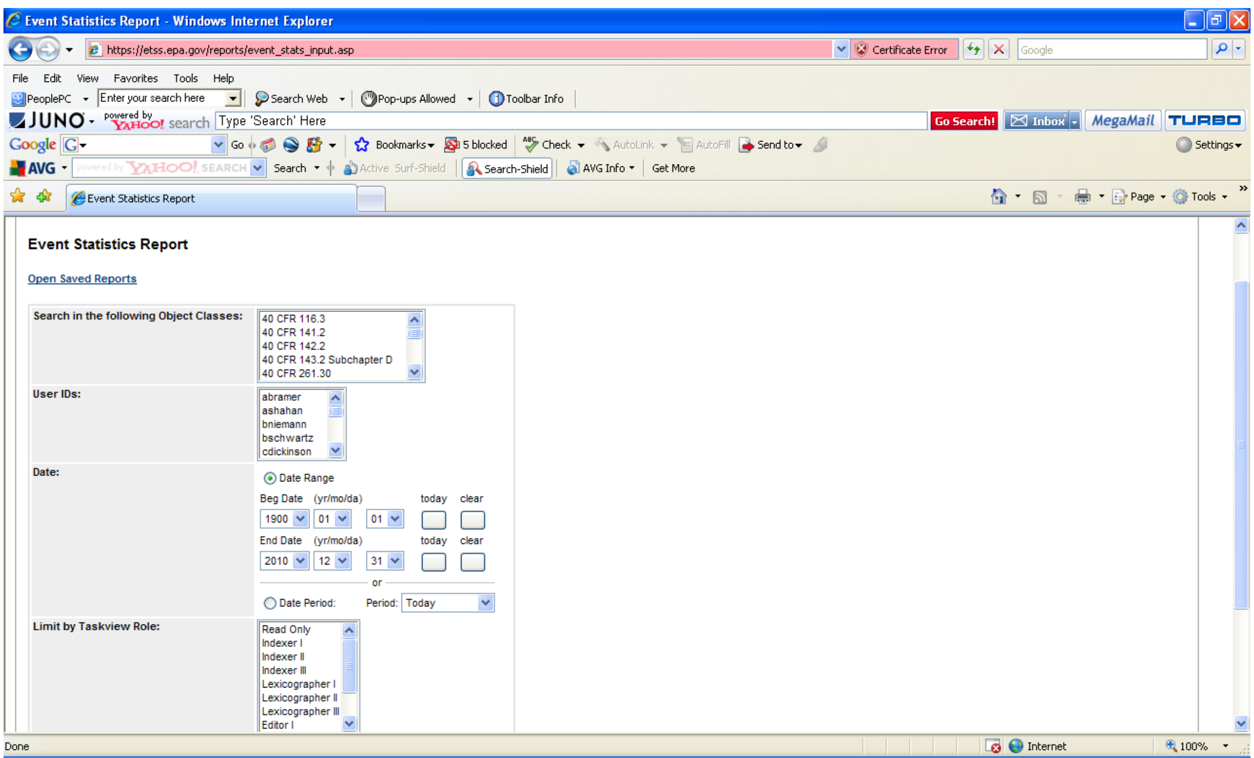
## 7.4 Event Statistics, Event Log Details, & Reporting Events Reports

Event reports provide information about Terminology System activity. Two of these reports, the Event Log Details and the Reporting Events Report can be created only by users having Super-Administrator permission. In all cases, these reports can be valuable to the Coordinators because they provide information about the usage of the System.

### 7.4.1 Event Statistics Report

The Event Statistics report allows a way to generate activity statistics for user(s) over a specified range of time. The report wizard allows filtering by specific criteria to query the event log table and count specific events. The Input form allows for the selection of an Object Class or Classes, a user or users, a date range in which to view activity and the taskview role that currently applies to the specified users.

**Select a Taskview.  Click on the REPORTS link from the top menu bar. Click on the EVENT STATISTICS link from the Report Menu.**




To create this report you can make selections in the following fields:

- **In “Search in the following Object Classes:” select one (or more) Object Class(es) to be searched.  Note: If no Object Classes is selected the report will search all Object Classes in the selected Taskview.**

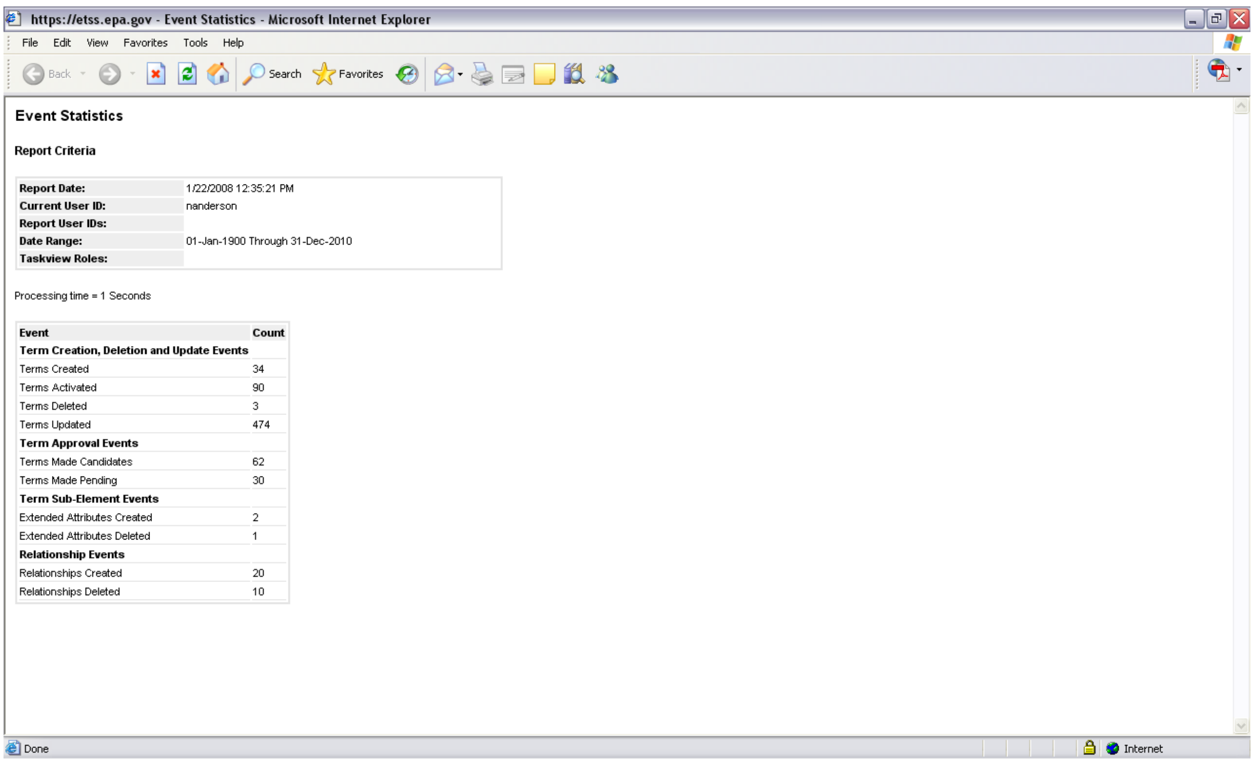
- **In “User IDs:” select one (or more) User IDs to be searched.  Note: If no User ID is selected the report will search all User IDs in the system.**

- **In “Date:” enter a beginning and end date for the event.**

- **In “Limit by Taskview Roles:” select one (or more) Role(s) to be searched.  If no Role is selected the report will search all Roles in the system.**

**Click on the CREATE REPORT button.**

*A new window opens, and the report is available here for viewing.*


https://etss.epa.gov - Event Statistics - Microsoft Internet Explorer

Event Statistics

Report Criteria

| | |
|---|---|
| **Report Date:** | 1/22/2008 12:35:21 PM |
| **Current User ID:** | nanderson |
| **Report User IDs:** | |
| **Date Range:** | 01-Jan-1900 Through 31-Dec-2010 |
| **Taskview Roles:** | |

Processing time = 1 Seconds

| Event | Count |
|---|---|
| **Term Creation, Deletion and Update Events** | |
| Terms Created | 34 |
| Terms Activated | 90 |
| Terms Deleted | 3 |
| Terms Updated | 474 |
| **Term Approval Events** | |
| Terms Made Candidates | 62 |
| Terms Made Pending | 30 |
| **Term Sub-Element Events** | |
| Extended Attributes Created | 2 |
| Extended Attributes Deleted | 1 |
| **Relationship Events** | |
| Relationships Created | 20 |
| Relationships Deleted | 10 |

## 7.4.2 Event Log Details Report (Administrators ONLY)

The Event Log Details Report is only displayed in the Report Menu for those users who have Super Administrator (SA) status.

The Event Log Details Report uses the same criteria as the Event Statistics report (see section 7.4.1), but it contains detailed information for each event performed according to the search criteria.  This report contains all the information that would be found in the term history but for the entire object class(es). Note: information about the term history can be found in the Synaptica User Guide available from the Terminology System and Services Resources web site. Its output can be in the form of a CSV or HTML formatted file.

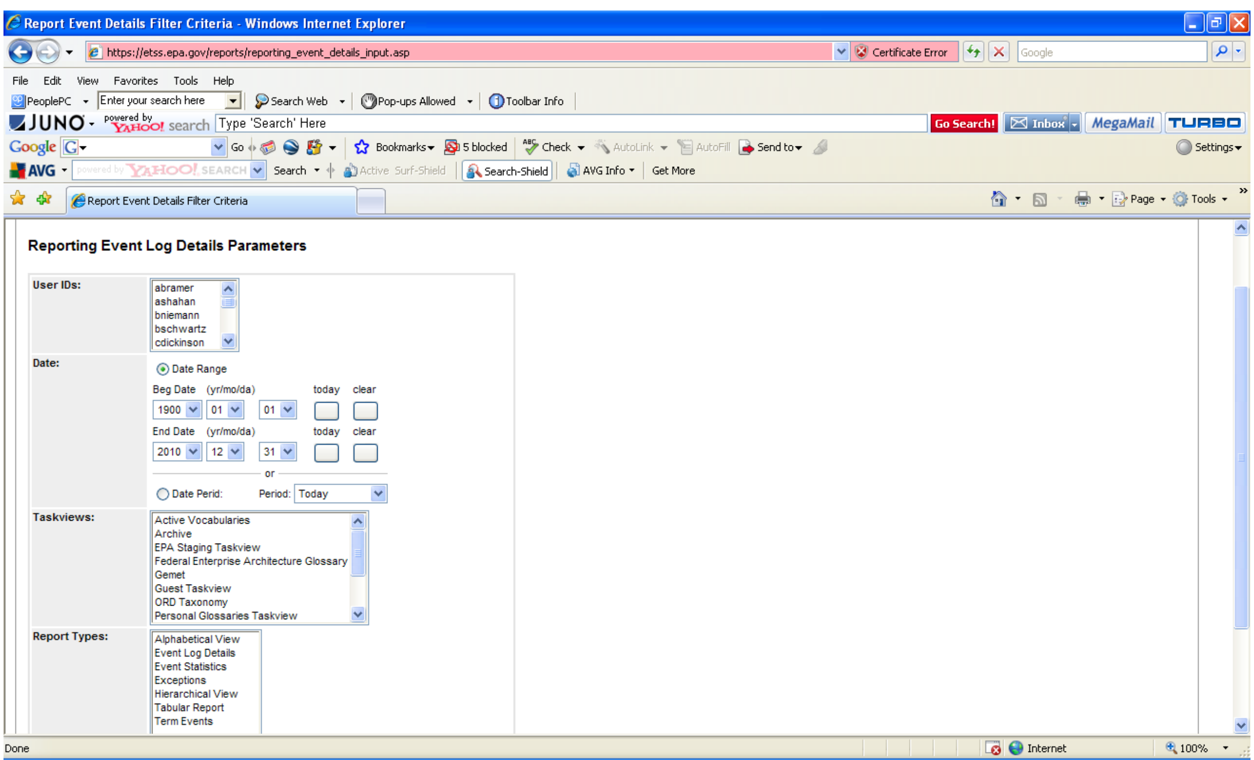
This report type is currently being used to track updates in the Web Taxonomy.  This report indicates any modification to the object class(es) and gives detailed information. The detailed information includes the terms, sub-element, and/or relationship for which the change was made. The original report is saved under the taskview from which the report was generated.  The saved report can be opened and the date ranges can be modified to regenerate the report to produce updates.  The reports can also be set up to run according to a pre-set schedule and the results can be e-mailed to the user automatically.

### 7.4.3 Reporting Events Report (Administrators ONLY)

The Reporting Events Report is only displayed in the Report Menu for those users that possess Super Administrator (SA) status.

The Reporting and Export Events Log Details Report offers a view to show what reports or exports have been created and presents the ability to either A) download that specific output or B) run the report using the identical criteria.

**Select a Taskview. Click on the REPORTS link from the top menu bar. Click on the REPORTING EVENT link from the Report Menu.**



To create this report you can make selections in the following fields:

- **In "User IDs:" select one (or more) User IDs to be searched. Note: If no User ID is selected the report will search all User IDs in the system.**
- **In "Date:" enter a beginning and end date for the event.**
- **In "Taskviews:" select one (or more) Taskview(s) to be searched. If no Taskview is selected the report will search all Taskviews in the system.**
- **In "Report Types:" select one (or more) Report Type(s) to be searched. If no Report Type is selected the report will search all Report Types in the system.**

**Click on the DISPLAY EVENTS button.**

*The system will refresh with the report information displayed*

*.*

# 8.0 RELATED RESOURCES

Additional information about the Terminology System and Services is available from the Terminology System and Services Resources web site. It provides access to the other manuals mentioned in this document, training materials, more detailed manuals from the vendor, and presentations about this project.

The Resource site is available at http://epatss.infointl.com.
[user=etss_user]
[password=ssteape_1]

***For more information from Dow Jones, contact:***

Christine Connors (Sales)
Dow Jones
Christine.Connors@dowjones.com

Jim Dwyer (Product Improvement)
Dow Jones
Jim.Dwyer@dowjones.com
303-987-9124

Jim Sweeney (Technical Support)
Dow Jones
Jim.Sweeney@dowjones.com
303-298-1947

# Appendix A

## Glossary of Synaptica Terminology

***Administrative Attributes***
Information about the status of a term, such as approval, language, workflow, locked or unlocked, BLAT and BTN.

***Approval*** Administrative attribute. New terms are added with the default status “Candidate” and promoted to “Approved” after editorial acceptance.

***BLAT***
Administrative attribute. Stands for Broad Level Access Term. The BLAT indicator should be set to *Yes* to indicate that the term is used for hierarchical grouping only, and should not be used as an indexing item; new terms are added with the default status of not being a BLAT.

***BTN***
Administrative attribute. Stands for Brand Trade Name. The BTN indicator should be set to *Yes* to indicate that the term descriptor is a proprietary name; new terms are added with the default status of not being a BTN.

***Category***
Terms can be assigned to categories. These categories are used to group topical or project-related sub-sets of terms; terms may be assigned to one or many categories.

***Descriptor***
This is the field that users search on, and which is displayed in search results. Every term has a descriptor field. In standard vocabulary management the descriptor is the topical subject term itself. In authority control management the descriptor is a name of a person, group, or company.

***Descriptor Element / Descriptor Fragment***
Some authority control terms require the descriptor to be made up from separate descriptor elements (also knows as descriptor fragments), such as the example of last name, first name, and middle names.

***Display Active/Deleted Status*** SEE DISPLAY APPROVAL STATUS

***Display Approval Status*** Report output option that displays in parenthesis whether a term is Active, Candidate, or Deleted

***Display BLAT Status***: Report output option that flags Broad Level Access Terms. SEE ALSO BLAT

***Display Created User ID***: Report output option that displays the name of the creator of the term record in a separate field

***Display Created Date-Time***: Report output option that displays the date and time of term record creation in a separate field. Several options may be chosen for the display of date and time.

***Display Last Modified UID*** : Report output option that displays the name of the user who last modified the record (ex: dclarke)

***Display Last Modified Date/Time***: Report output option that displays the date and time of the last modification of the term record after each term

***Display NPT Status*** – Report output option that flags terms that are non-preferred terms. SEE ALSO NON-PREFERRED TERM

***Display Object*** – Report output option that displays the source of the term after the term in parenthesis (ex: acid rain (Clean Air Act – Plain English)

***Display Pathways*** Hierarchical report output option that displays hierarchies in a breadcrumb pattern. For example:

Audiences
Audiences > All
Audiences > Consumers
Audiences > Contractors and Grantees

***Display results with hyperlinks*** Report output option that allows user to click on term and get to term record screen where term record may be edited

***Extended Attributes*** Besides the descriptor, terms may also have extended attributes. These store additional metadata information about the term.

***Headwords***
A form of term descriptor used in reports.

***Insert Blank Line Before Each Headword***: Report output option that inserts one blank of space before each term, allowing for space between lines and a neater appearance. SEE ALSO HEADWORDS

***Item***
Any unique piece of information in the system; an item can be a term, a display configuration or a relationship rule.

***Language*** Administrative attribute. New terms are added with the default language “English”; terms can be assigned to other languages to indicate the native language of the term’s descriptor.

***Locked*** Administrative attribute. New terms are added with the default status “Unlocked”; they can be locked or unlocked by users with a “Lexicographer III” or higher level of permissions. When records are locked they cannot be edited or deleted except by users with a “Lexicographer III” or higher level of permissions.

***Non-Preferred Term***
A status for the term dynamically inferred by the system, based on the relationships belonging to the term. If a term has a relationship of the class “Use” then it has the status of being a Non-Preferred Term (NPT).

***Object Class*** Used to group and distinguish conceptually similar terms, such as subject descriptors, personal names, documents, etc. Each object class carries instructions on how to format terms belonging to the class. A term may only be assigned one object class.

***Orphan Terms*** Approved terms in a hierarchical structure that do not have a broader term relationship with any other term in the vocabulary.

***Permissions*** Users are granted access to different Taskviews, and have different levels of functional permissions for different Taskviews. Also called “privileges”.

***Preferred Term*** A status for the term dynamically inferred by the system, based on the relationships belonging to the term. If a term does NOT have a relationship of the class “Use” then it has the status of being a Preferred Term (PT).

***Relationship*** A connection between terms, defining how they are associated with each other.

***Synaptica*** A knowledge management, authority control and database indexing software application developed by Factiva. Used for the development of topical vocabularies with standard thesaural relationships, the mapping of vocabularies, the subject indexing of database records using terms from the controlled vocabulary, and the development of named entity vocabularies (Authority files).

***Taskview*** Taskviews pre-filter searches to a selection of objects and categories related to specific tasks. (E.g. a team building a medical thesaurus could have a Taskview set up to restrict access to terms from the “Subjects” object class and the “Science” and “Medical” categories. Permissions are also attached to Taskviews.)

***Term*** Refers to a unique record that relates to topical information or an authority file. All terms are also items, but not all items are terms.

***Top Term*** A term that has no relationships to broader terms and no “Use” relationships.

***Workflow*** Administrative attribute. New terms are added with the default status “Normal”, but could be flagged for priority handling or other project related statuses.

# Appendix B

## Sample E-mails for User Account Set-Up

***Sample E-mail from NCC when Windows account is set up:***

Hello ,

Your User ID for Synaptica is:

EPA information technology security protocol prohibits password distribution via e-mail. Please contact [Window's Administrator] at EPA's National Computer Center to receive your password verbally.
[Window's Administrator] can be reached at [contact number].

In addition to obtaining a user name and password, contractor staff from Information International Associates will contact you to determine what editorial privileges are appropriate for your work.

Once you have your user name, password, and editorial privileges established, you can access Synaptica by doing the following:

1. Go to the System of Registries at [www.epa.gov/sor](www.epa.gov/sor)
2. Click on "Login for EPA and Partners" and provide your EPA Portal User ID and password. Do not use your Synaptica User ID/password for this login.
3. Once you are logged in, click on Terminology Services.
4. Login to Synaptica using your User ID and password

Synaptica passwords are reset on a fixed 90 day cycle. The current cycle ends [date]. About one week prior to resetting passwords, you will receive e-mail notification of the pending change and provide instruction on how to obtain your a new password.

Please contact [Window's Administrator] if you are unable to log in.

Thank you for your patronage.

____________
CSC ITS-EPA Team
Supporting the Environmental Protection Agency
Research Triangle Park, North Carolina

***Sample e-mail from Coordinator or Coordinator's Representative when the Terminology System account is set up:***

Hello Joe,

Step 2 of the EPA Terminology System user process is complete. You have _____ access to the Training and Active Taskviews. This allows you to search and browse, but you can't make any changes to the vocabularies. The training materials are available at http://epatss.infointl.com [ user ID: etss_user; Password: ssteape_1 ]

There are also some presentations and documentation, including the Getting Started Guide, that will help you get familiar with the Synaptica system.

If you have any questions regarding access to the system, please contact the Terminology Services Coordinator, Mike Pendleton (pendleton.michael@epa.gov).

Thank You,

***Sample E-mail from NCC sent a week before password updates:***

Dear Synaptica Users,

As you may recall, Synaptica log-in passwords expire every 90 days. We are approaching the end of the current cycle, and are resetting all Synaptica user passwords on [date].

On [date], you will receive email notification from Carolyn Pulley that your password has been reset. You will be instructed at that time to contact [Window's Administrator] at [contact number] to verbally receive your new password.
We recognize that having to verbally request passwords is a bit cumbersome, but EPA's information technology security protocols require this for Synaptica.

Thanks for your understanding and continued patronage.

***Sample E-mail from NCC when Windows password is updated:***

Good Morning Synaptica Users,

Your Synaptica password has just been updated. Your new password will be valid until [date].

EPA IT security protocol prohibits password distribution through e-mail - please contact [Window’s Administrator] at EPA's National Computer Center to receive your new password verbally. [Window’s Administrator] can be reached at [contact number].

Please be aware that Synaptica does not allow you to change your password, nor does warn you of a pending expiration. Your account will be locked after your password expires. If you are ever unable to access Synaptica, please contact [Window’s Administrator] for assistance.

Thank you for your continued patronage.

# Appendix C

# Customer List Spreadsheet

| List of User Accounts | Organization | E-mail Address | Role in Synaptica | Operations | Project Duration | Username | Password | Expiration | Web Services Password | SA Permission | Sponsor | Notes |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| User, Joe | EPA, OEI | User.Joe@epa.gov | Editor of [ ] Vocabulary | Add and delete terms. | FY08-09 | juser | ##### | 4/1/2008 | Y or N | Y or N | Lisa Manager | |

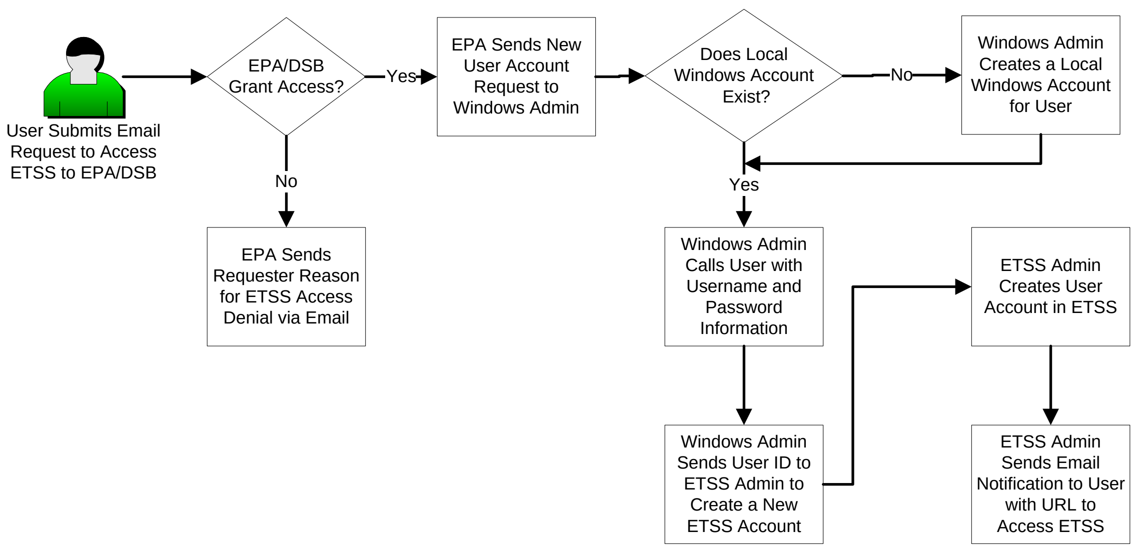
# Appendix D

# User Account Set Up Documentation from NCC

## EPA TERMINOLOGY SYSTEM SERVICES User Administration – February 2008

The technical solution chosen will require that a local windows account be established for all authenticated editors. This technical solution also requires one ETSS application server, and one web server behind the public access firewall. This selected scenario presents some user administration challenges that require two types of user administration processes. A system administrator at NCC will maintain all local windows accounts, which include new and expired accounts, and password changes.

An EPA Terminology System Services administrator will be needed to maintain the authenticated users in ETSS. A general overview of the process is illustrated in the following graphic:




### User Administration Process

The Windows Administrator will notify Windows account holders quarterly as passwords will expire on January 30, April 30, July 30 and October 30 of each year. Email notifications will be sent to all users via EPA Lotus Notes. The process model is as follows:


All windows account deletion requests must be submitted to the Windows Administrator by EPA/DSB. It is understood that the existing password procedure is only approved for the first development phase of Synaptica. During the second phase, the current password procedure will be integrated into Identity Management or COREid.

Personnel will be assigned different permission levels depending on his or her role. The Functional Privileges Manager component of Synaptica® lists the names and definitions of the various levels of functional privileges. Functional privileges control what functions individual editors can perform while logged into to a specific Taskview. The SA user can assign individual users different functional privileges in different Taskviews. A user may have read-only access to one Taskview and at the same time full editorial privileges to another. This COTS product does not provide any other type of user access identification or monitoring.

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